# Sage MAS 500 ERP

# **Version 7.3 Pre-Release Guide**



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# Overview

Sage MAS 500 has a rich history as an award winning ERP solution that delivers comprehensive business functionality which enables mid-market enterprises to improve efficiency and productivity while reducing operational costs. Powerful, yet simple real-time reporting and data analytics provide business intelligence needed to optimize business decisions and maintain a competitive edge during challenging economic conditions.

Version 7.3 extends that heritage by setting new standards for quality and reliability, by introducing numerous usability enhancements that improve productivity and ease of use, and by significantly improving performance and scalability to empower you to accomplish more with fewer resources. Extended platform updates deliver support for the latest operating systems, database platforms, and virtualization.

Both new and existing customers will immediately benefit from the new technologies, in addition to the usability, scalability, and performance improvements throughout the system. We encourage Sage MAS 500 customers and Business Partners to review this Pre-Release Guide to fully understand the value and opportunity that Sage MAS 500 version 7.3 delivers.

# Availability

Version 7.3 is expected to begin shipping in November 2009 to all customers with an active Sage maintenance plan.

# **Functional Enhancements**

# New Module – Credit Card Processing

The new Sage MAS 500 Credit Card Processing module enables customers to quickly and easily process payment receipts. New features deliver advanced security and ease of use to support your payment processing needs.

- Allows multiple Credit Card accounts per Customer
- Supports multiple Credit Card types and Processor types:
  - Sage Payment Solutions
  - PayFlow Pro by PayPal
  - Other (custom snap-in interface)
- Supports Address Verification and Card Security Code
- · Credit Card transactions can be initiated and managed from within
  - Sales Order
  - Accounts Receivable
  - Cash Management

#### Pricing:

- No charge if using Sage Payment Solutions as the processor
- No charge if already licensed for Sage MAS 500 PSG Credit Card Processing





 Please contact your Sage MAS 500 Business Partner for all other pricing questions, including pricing to activate a processor other than Sage Payment Solutions.

#### 7.3 Credit Card Features:

Operational Area	Credit Card Processing Features
Sales	Down payments
	<ul> <li>Multiple authorizations per order</li> </ul>
	Multiple credit cards per order
	Level I & II transactions
Shipping	<ul> <li>Capture funds during shipping</li> </ul>
	<ul> <li>Reauthorize partial shipments</li> </ul>
	<ul> <li>Flexible error handling (stop shipment, invoice balance)</li> </ul>
Accounts Receivable	Cash receipts
	Invoice payments
	Refunds
Customer Care	<ul> <li>Store card information for next visit</li> </ul>
	See all transactions performed for a customer
Security	PCI compliance
	Encrypted card storage
	Secured communication
	<ul> <li>Support for the <u>Sage Vault</u></li> </ul>
	Address verification
	Card security code
	<ul> <li>Length, first digit, MOD10 validation</li> </ul>

#### Note to Current Sage PSG Credit Card Customers:

The new 7.3 Credit Card module has greatly enhanced functionality compared to the Sage PSG module, and delivers a more complete and secure credit card processing solution. There are some differences that current PSG credit card customers should be aware of:

- Some reconfiguration will be required such as re-entering customer credit card information in v7.3.
- Processors supported out of the box in v7.3 are Sage Payment Solutions and PayFlow Pro by PayPal. In contrast, the PSG version supported PCCharge and Sage Payment Solutions. So, a customer using PCCharge as their processor would either need to change processors, or create a custom interface in v7.3 for PCCharge.





#### Screen Shots:

Maintain Credit Card Processor Accounts						
▼ 🔄   🥙 🗠   118   ♥   109   138 (38   100						
Processor						
Account SPS-USD 📎 🔽 Active Sage Payme	ent Solutions Test Connection					
Defaults						
	Address Verification (AVS)					
Perform Sale Transaction if Process Pmt Fails	🔽 Require AVS					
Reauthorize Remaining Balance on Partial Shipment	✓ Ignore AVS Failure					
Minimum Days to Retain Credit Card Transactions						
Billing	Card Security Code (CSC)					
Stop Shipment if Credit Card Fails	✓ Require CSC					
	✓ Ignore CSC Failure					
A <u>b</u> ove \$10.00 in value	Je Ignole CSC Failule					
✓ Before shipment commit						
During shipment commit						
, ,						
Accounts						
Currency USD 🔍 U.S. Dollar						
Receipt Account 0000-00-00 🔍 😫 Suspense						
Bank Account Checking - Corp						
Additional Parameters						
Key Val	ue					
Merchant ID						
Merchant key						
Transaction web service https://www.sagepayments.net/web_services/vt	term_extensions/transaction_processing.asmx					
Bankcard web service https://www.sagepayments.net/web_services/w	sagepayments.net/web_services/wsVault/wsVaultBankcard.asmx					
Vault web service https://www.sagepayments.net/web_services/w						
Report web service https://www.sagepayments.net/web_services/vt						
Batch web service https://www.sagepayments.net/web_services/vt	term_extensions/batch_management.asmx					
	•					
	admin   SOA   6/30/2008 🔂 🏑					

The Maintain Card Processor Accounts screen enables you to create and maintain credit card processors such as Sage Payment Solutions, and configure processing options for that processor.



📽 Activate Credit Card Proces	sor 📃 🗖 🔀
Processor © Sage Payment Solutions © PayFlow Pro by PayPal © Dther Name	"Snap-in" connectors
Storage Store Credit Card Information Vaulting Service C Local C Sage Payment Solutions	Security Database Master Key Password TEXEXEXENT EXAMPLE You must create a keyword to use to protect the database storing the customer and merchant credit card information. You may have to enter a complex keyword consisting of letters, numbers, and/or symbols.
Encryption Encryption Key THERE A Keyword to create a keyword to create a keyword to create a customer card information.	ate a unique

The Activate Credit Card Processor screen allows you to select the processor to use for credit card payments, and enter security information.

🔓 Set Up Tender Types				
🖌 🔄 🥥 💥 🖓 🖓 🖓 🥵				
Tender Type 🛛 🕅	Description Wisa			
	Credit Card Company Address			
Iender Type Class Credit Card	Name Visa International			
Processor Account sps	Street Addr 120 Madison Avenue			
Deposit Method				
<u>R</u> eceipt Account				
0000-00-00-00				
Suspense	City New York State NY 💌			
	Postal Code 10001- Country USA -			
	Credit Card Details Deposit Group			
	Check Digit Validation Visa/Mastercard V			
	Credit Card Number Mask Length Prefix			
	Example - xxxx-xxxx-9999			
	admin SOA 6/30/2008 📝			

Tender Types are created to define a specific credit card type, the corresponding processor, and GL account to use when posting receipts.



📟 Maintain Customer   ✔ 📄   🍥 👳   🛃	rs 🗄 🗐 🔓 🖶 🥥	
	Name Name	🔤 Maintain Credit Card
Status A Std Industry Code Vendor Customer Reference Bank ABA Number	Defaults Bill To/S	Ship T         Prim         Street         Credit Card Name         Vic's Visa         Credit Card Information         Tender Type         Visa         Account Number         xxxx-xxxx-1234         Cardholder's Name         Exp. Month:         January         Year 2010
Credit Apply Credit Limit Credit Limit Aging Category On Hold	100,000.00 80 Days 💌	Prim Nam Title Teler Fax E-N Cards Doc Transmittal Sales Tax Exemptions admin SOA 6/30/2008

From the Maintain Customers screen, users can easily view and maintain credit card account information for that customer.

#### Sage Payment Solutions (SPS) Overview

- Provides credit card authorization, capture and settlement via SPS Gateway
- Strict Adherence to PCI (Payment Card Industry) data standards which provides secure and rapid payment authorization
- 24/7 online tools for account management, inquiry, and historical reporting
- Easy conversion from alternative providers
- SPS supported at no charge with Sage MAS 500 Credit Card Processing

### **Business Insights Enhancements**

#### **Pending Inventory Transactions Views**

The following Business Insights Explorer (BIE) views are now available for you to view pending inventory transactions (see screen shots in the Inventory Management Enhancements section below):

- Pending Increase Transactions
- Pending Decrease Transactions
- Pending Physical Counts
- Posted Physical Counts



- Pending Lots (Preview)
- Pending Serial Numbers (Preview)

#### **Context Menu Utility**

The Context Menu Utility provides customers and partners the ability to customize the out-of-the-box Business Insights Explorer context menus (i.e., right-click menus) and views, in addition to creating new BIE views. With it, you can:

- customize BIE views
- add new BIE views
- add and hide preview, drill-into and manage options
- create bridge views
- export and import any BIE customizations from a test system into a live production system

The Context Menu Utility was first introduced in the June 2008 monthly update (MU) for version 7.2, and is included as an integral feature in version 7.3.

Business Insights View Customer											
<u>M</u> ain Colu	imn M	apping <u>N</u> avi	gatior	n Tasks Navigatio	on <u>R</u> elationships						
Status			Override Cap	otion Destination ¥	Destination View		уре	Filter Column			
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🛄 Drill Into	2	Active	-	Open Orders	SalesOrder	٩	Static	-	Status	-	E
	3	Active	-	Open Invoices	Invoice	٩	Static	-	Status	-	E
An aluan	4	Active	•	Open RMAs	RMA	0	Static	-	Status	-	E
Analyze	5	Active	•	Open Projects	Project	٩	Static	-	OpenOrClosed	-	E
2 Managa	6	Active	-	Open Work Orders	WorkOrder	٩	Static	-	Complete	-	E
🖉 <u>M</u> anage	7	Active	•	Recent Payments	CustomerPayment	9	Lookup	-	TranDate	-	A
	8	Active 👻		Unapplied Payment	s CustomerPayment	9	Static	-	UnappliedAmt	-	G
	9	Active	-	Addresses	CustomerAddr	9	Static	-		-	E
	10	Active	-	Active Memos	CustomerMemo	٩	Static	-	EffectiveDate	-	I
	11	Active	-	Last Activity	CustomerLastActiviț	, 🔍	Static	-		-	A
	11	Active	<b>_</b>	Last Activity	CustomerLastActivit		Static	<b>-</b>		-	

# **Global Enhancements**

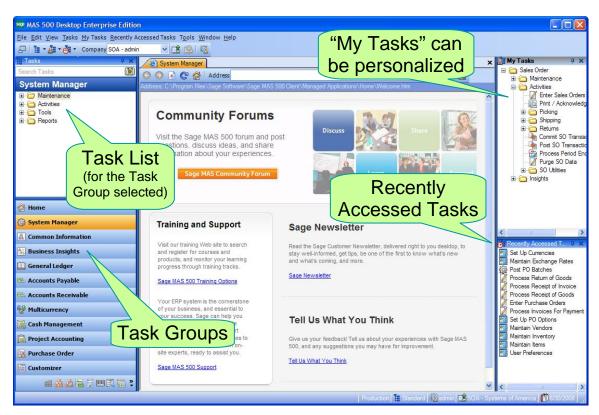
#### Updated Sage MAS 500 Desktop

The Sage MAS 500 Desktop has been updated with improved controls for task access and navigation, with a familiar Outlook look and feel.

• The Tasks Explorer Bar has been updated to simplify the navigation by allowing you to display the menus for one module at a time. You can also choose from various Explorer styles on the View menu to change the behavior of the Explorer Bar buttons and how the menus are displayed.



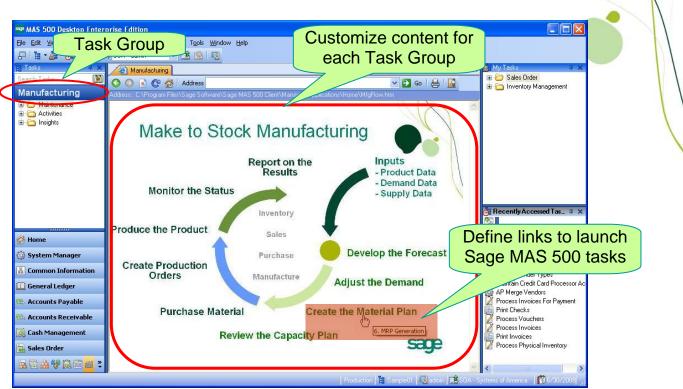
- You can personalize the Tasks Explorer Bar using the Navigation Pane Options. Change the order of the module menu groups, and hide or show groups on the menu. This also delivers improved role-centric adaptability.
- The My Tasks Explorer Bar now appears on the right-side of the Desktop by default to provide improved access to the menu as well as simplify dragging tasks to the menu. The Tasks and My Tasks Explorer Bars can still be displayed as tabs (as in previous versions) by unlocking the Desktop and dragging one Explorer Bar on top of the other.
- When you drag an Explorer Bar, docking indicators are now provided to indicate (by highlighting the location) where the Explorer Bar can be placed on the Desktop.



• A new Recently Accessed Tasks window displays a list of the most recent tasks used. This window can be configured to control the number of entries displayed.

Additionally, new levels of flexibility and customization are delivered with the ability to define custom content to display for each Task Group by pointing to a simple web page. You have complete flexibility to define the content according to your business needs, such as a workflow diagram, links to various documents or external sites, or a statement of company policies and procedures.





In this example, the "Manufacturing" Task Group has been customized to display a simple web page containing a Make to Stock Manufacturing workflow diagram. Each step shown in the diagram was created with links to launch the corresponding Sage MAS 500 task. For example, clicking on "Create the Material Plan" will conveniently launch the Sage MAS 500 MRP Generation task.

#### **Extended Platform Support**

Version 7.3 includes support for some of the latest technology platforms. You can now use Sage MAS 500 on Microsoft SQL Server 2008 and Windows Server 2008. Support has also been added for 64-bit versions of client and server operating systems and virtualization platforms. Complete details will be published in late October in the Sage MAS 500 v7.3 Compatibility and Resource Guide.

#### **Data Migrator**

When Sage MAS 90 and 200 customers are ready to upgrade to Sage MAS 500, Data Migrator migrates data from Sage MAS 90 and 200 to Sage MAS 500. Data Migrator now supports migrations from Sage MAS 90 and 200 version 4.10.

#### PDF Document Transmittal for Vendors & Customers

Vendor and Customer documents can now be generated and e-mailed in PDF format (in addition to RTF and HTML). This improves security since PDFs typically cannot be edited, and improves efficiency since it eliminates the need to create PDFs separately.



👓 Document Transmittal Configuration 🛛 🛛 🗙
🛩 🔜 🛛 🥥 💥 🛛 🔣 🐯 🐯 🗮
Aldebrn Aldebaran, Inc.
Transaction Invoice
✓ Hard Copy
Email Formats      FTF
C HTML
C PDF

#### **Application and Database Auditing**

Application and database auditing was enhanced with the addition of two optional triggers that are used to keep track of data modifications.

- Database Auditing Trigger tracks changes made by non-Sage MAS 500 applications to the database tables.
- Application Auditing Trigger tracks user changes (deletions, additions, and modifications) made through the Sage MAS 500 Tasks.

Additionally, auditing can be turned off to maximize system performance. When auditing is disabled, the auditing triggers are not loaded or compiled, saving valuable SQL Server resources.

#### Full Company Name Displayed During Login

During login, the full company name is displayed (instead of the company abbreviation).

👓 Sage MAS 500 I	Login		
🔲 Use Windows Aut	hentication		
User Name:	admin		
Password:			
Company:	SOA-Systems of America	~	>
Advanced Option Server / Database Change Server / I SQL Serve	SOA-Systems of America	Herresn	
	e: Feb05_app	✓	



## Inventory Management Enhancements

## **Physical Count**

The Inventory Physical Count process has been enhanced with significant workflow and user interface improvements to make the count process fast, efficient, and accurate.

- Enter counts using new grid entry (using stock unit of measure).
- Expanded item selection criteria and sort order control. You can also select individual list items to count, and save count selection settings for future use.
- Warning messages are also displayed for items with missing counts.
- In the Enter Counts task, you can now filter a list of count items, include counted or uncounted items (or both), enter counts directly into a grid, and edit batch information.
- Option to set remaining uncounted items to zero
- Ability to delete frozen controls from a batch
- New detailed transaction report, and history table for audits
- Users who might prefer to enter counts in Excel instead of the new grid entry can select items to be counted in Sage MAS 500, export to Excel and fill in the count quantity, and use DataPorter to import the counts back into Sage MAS 500

saç	👓 Select Count Items (BATCH IMPC-0000007)										
ę	etting HW_Mez1S						Expanded				
<u>S</u> election			<u>O</u> ptions			Selection Criteria					
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	Field	Condit	ion			~_			<b></b>		
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	Status	All							Show	Selection	
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	Item Description	All									
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	Bin	All							•		
1	C 11										
	Count Items	_									
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	Count	Item	Item Descri	iption	Zone		Bin	Bin	Location	<b></b>	
		GatewayE5200	Scaleable Work		Mez1S	A3-01-02-18		A2Lvl1Bay2		Hard	
		GatewayE5250	Deluxe 550 Wo	orkstation	Mez1S	A3-01	-02-18	A2Lvl1	Bay2	Hard	
		GatewayE5250	Deluxe 550 Wo	orkstation	Mez1S	A3-01	-01-17	A3Lvl1	Bay1	Hard	
		Gateway700	Desktop Intel P				A3-01-01-16 A3		Bay1	Hard	
		Gateway500SE	Intel Pentium III	500 MH	Mez1S	IA3-01		A3Lvl1		Hard	
		PII	Selec	rt in	dividua		-01-17	A3LVI1	Rau1	Hard	
			OCICC		uividua					-	
F			list ito	ms	to cour	ht i					
A	After selecting items to count, click Add to Sele										

On the Select Count Items screen, the Selection tab provides flexible selection criteria to easily determine which items to count. From the selection results, checkboxes in the lower panel enable you to select individual items to count.



Select Count Items (BATCH IMPC-0000007)		
Image: Setting Hw_Mez1S            Setting Hw_Mez1S	Options	Save settings for future use
Control Numbers	Control Num	Cer Sort Order
_ Inglude Items with Zero Quantity on Hand	First Second Third	None None None Bin Docation Bin Sort Order Item Item Item Class Item Description Purch Prod Line
After selecting items to count, click Add to Selection to add more item	of Co	Sort Order unt Items

The Options tab enables the user to set the control number sort order.

Se Enter Counts ['Rialto	Batch: IMPC-00000					
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<b>F</b> b.,						
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Item Description	All		ount nei	115	Ap	ply
Bin Location	All					
Zone	All				-	
Count Items						
Set Uncounted to Zero	Use this section to enter f	rozen count quantities. Count	quantities are automati	cally saved.		
Control No.	llem		Serial	Count Qty	Stock UOM	Item Di 📥
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	wayE5200 AS OF 02				Each	Scaleable \
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Single Count Entry	· •		(	-	- 114	-
				E	Edit an	D
		intain blank cards, navigate to	) any item in the batch			<b>.</b>
Control No. Item	Bin	Lot		Navi	gate E	Batch
	<u>_</u>	2	SIL		0	
					admin SOA 6	/30/2008 🗐 🏿 🎢

The Enter Counts screen contains an easy-to-use grid entry. Powerful filter criteria empower you to target count items to display, and allow you to select uncounted items, counted items, or both. Save time by automatically setting uncounted items to zero.



#### **Recalculate Inventory Quantities**

The new Recalculate Inventory Quantities utility can now be run on demand (executes the SQL Server "QtyOn" job).

PRecalculate Inventory Quantities					
• 📓 🔚 🛛 🖓 🕯	<u>a</u>				
Setting (None)	V	🔽 Recalculate	e Inventory with Variance Activity Only		
Field	Condition				
Warehouse	Is equal to	Denv			
Or Warehouse	Is equal to	Rialto			
Item	Is equal to	1.44 Floppy			
Orltem	Is equal to	28.8 Modem			
Orltem	Begins with	S			
lo records to process			admin SOA 6/30/2008 🗐		

#### **Business Insights Explorer Views**

The information you need is available at your fingertips. Several new Business Insights Explorer (BIE) views are now available for you to view pending and posted inventory transactions:

- Pending Increase Transactions
- Pending Decrease Transactions
- Pending Physical Counts
- Posted Physical Counts
- Pending Lots (Preview)
- Pending Serial Numbers (Preview)

🕶 Maintain Inventory 🖌 💭 🥥 💥 🖶 🕢 😗 🐯 🕏	2 6	
Warehouse Rialto <u>S</u> Ria Item 1.44 Floppy	alto Distribution Center	- Floppy Drive
	Previews D Drill Into D Analyze Manage D	Open Purchase Orders Open Sales Orders Open Inbound Transfers Open Outbound Transfers
Status Active Date Established 01/01/200 Item Type Finished Go	MRP Planning Bill of Material What's This?	Open Lots Inventory Status Stock Status Last Activity Available Serial Numbers
Unit Cost Standard \$1.1 Replacement Average Landed Last	\$14.0000	Pending Increase Transactions     Pending Decrease Transactions     Pending Physical Counts     Posted Physical Counts     Hits     X
		admin SDA 6/30/2008 🜌

New Inventory Previews can be selected to show details on pending inventory transactions.

😻 Explore - Pending Inventory T	ransact	ions												. <b>.</b> X
le <u>E</u> dit <u>V</u> iew <u>P</u> review <u>D</u> rill Into <u>A</u> nalyze <u>M</u> anage Insights Iools <u>Wi</u> ndow <u>H</u> elp														
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Explore Pending Invent 🏈 🔀	Explore Pending Invent_													
Preview	Tran 1	Type △ Tra	insaction	Transac	tion Type	Batch	Whse /	Locatio	on Bin		Item		Item Descri	ption
Inventory Transaction Distri	S	H 00000	000669-SH	Customer	Shipment		Rialto	A2LvI1B	ay1 A2-01-01	-07 Gr	aphic Station	Graphic W	/orkstation PC	
Pending Lots	S	H 00000	000713-SH	Customer	Shipment		Rialto	A2LvI2B	ay2 A2-02-02	-11 Mo	ouse	Microsoft I	Mouse	
Inventory Status	) S	H 00000	000700-SH	Customer	Shipment		Rialto	A1LvI1B	ay1 A1-01-01	-01 PS	ZHD160G	PSZ 160G	B Hard Drive	
Stock Status	S	H 00000	000700-SH	Customer	Shipment		Rialto	A1LvI1B	ay1 A1-01-01	-03 PS	ZHD160G	PSZ 160G	B Hard Drive	
Pending Serial Numbers	S	H 00000	000688-SH	Customer	Shipment		Tampa	Default	Default	PS	ZHD160G	PSZ 160G	B Hard Drive	
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		ransaction		ction Type	Item	Item Desc	•	Dist Qty	Serial	Whse	Wareh		Location	Bin
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		00000700-SH		ar Shipment					PSZHD00002 PSZHD00003		Rialto Distribu			A1-01-01-0
		00000700-51	Custome	a ompinent	1 SEND 100G	1 32 100381	ard brive	1.0000	1 3211200003	Thatto	Tuato Distribu	aon center	Alconoayi	Aronoron
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d Analyze														
📝 Manage	11													
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New BIE Previews allow you to view pending Lots and Pending Serial Numbers. This example shows a pending shipment with three serialized items.



July 2009

🍄 Enter Sales Ord ✔ 📄 🞯 💥	lers and Quotes □ ☑ ☑
· ·	m Signification / / USA Total USD \$4,678.52
<b>€</b>   <b>₹</b> , 3× ∋×	🔄 🔄 🎓 🗟 🖨 💿 Qty Available <u>37</u> Replenishment]
h 1 Testata and	Item Qty Ordered UOM Unit Price Sales Amt Deli A
1 TrainingMa 2 Crystal Re	Replenishment Position
2 Ciystaine	📓 🔮 🥵 🐯
	Warehouse: Rialto UOM: Each   Item: TrainingManuals   Replenishment Position   Quantity on Hand 51.0000   Quantity Pending (+) 10   Quantity on Inbound Transfer 0   Quantity on Purchase Order 0   Quantity on Work Order 0.0000   Quantity on Outbound Transfer 16   Quantity on Outbound Transfer 18   Quantity on Outbound Transfer 18   Quantity on Sales Order 8   Quantity Required for Work Order 0.0000   Replenishment Position 19.0000
Open Outbound Transfers Open Lots	Inventory
Inventory Status	Whse         Item         Description         Established         Buyer         Primary Vendor         COS Rank         Gr Mrgn Rax         Hits Rank         Sale           Rialto         TrainingManuals         Complete Software Training Manuals         5/8/2006         Surfington         X </td
Stock Status Last Activity	
Available Serial Numbers	Pending Decrease Transactions
Pending Increase Transactions Pending Decrease Transactions Pending Decrease Transactions Pending Churical Counts	Transaction Type         Batch         W/hse         Warehouse         Docume         Item         Item Description         Dist Q           Justomer Shipment         Rialko         Rialko         Distrouton Center         A1Lv11Bay1         A1-01-01-01         TrainingManuals         Complete Software Training Manuals         40.000           Customer Shipment         Rialko         Rialko         Distribution Center         A1Lv11Bay1         A1-01-01-01         TrainingManuals         Complete Software Training Manuals         4.0000           Customer Shipment         Rialko         Rialko         Distribution Center         A1Lv11Bay1         A1-01-01-01         TrainingManuals         Complete Software Training Manuals         4.0000           Customer Shipment         Rialko         Rialko         Distribution Center         A1Lv11Bay1         A1-01-01-01         TrainingManuals         Complete Software Training Manuals         4.0000

From the Sales Order entry screen, drill into pending inventory transactions down to line item detail.

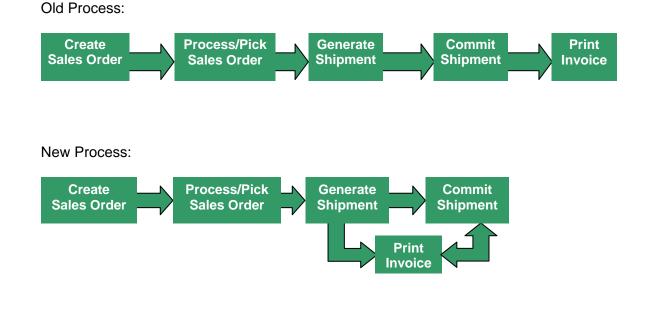


# Sales Order Enhancements

#### **Shipment Commit Workflow**

Previously, shipments had to be committed before an invoice could be printed. The shipment commit process has been enhanced to enable printing a pro-forma invoice before committing the shipment. Thus, a printed invoice can be included in a shipment, or quickly printed for counter sales and handed to a customer.

- The Edit Shipments task is enhanced with a new Invoiced status and the ability to generate, print, and view invoice details for a selected shipment.
- Quickly generate and print a pro-forma invoice prior to committing the shipment.
- Delete pending invoices before committing shipments.
- New security events control the ability to generate and delete pro-forma invoices prior to commit.
- Enter and apply payments in the Process Sales Order and Edit Shipments tasks.
- New "Ready To Commit" and "Shipment Status" selection criteria have been added to Select Customer Shipment task, allowing the commit processing to be postponed until after-hours if desired.
- Significant performance improvements in the Sales Order Commit and Edit Shipment tasks.
- New setting to optionally bypass commit validations when editing and saving shipments, thereby optimizing performance before the final commit.



	🖣 Invoice Totals		New Status
🕮 Edit Shipments	🌉   🕐   🖑   🛅		
✓ □ ◇ ② ※ ▷ □ · ♣ 箇 ③ ③ ③ Type Sale • Ship Whee Rialto	Invoice No. Sales Amount	0000001113-IN	Status Invoiced
Shipment 0000000733 S Customer Aldebrn	Freight	4,630.00 0.00	Ship Io Aldebrn
<u>,</u>	Trade Discount	-318.00	
Ship-To Address	Sales Tax	366.52	Invoice
Name Aldebaran, Inc. Address 🖉 498 Telemark St.	Invoice Total	\$4,678.52	Generate Invoice Delete Invoice Enter Payments
City Los Angeles State CA Postal Code 90001- Country USA	Shipping Label Bill of Lading	Shipping Labels BL-Bill Of	Total \$4,678.52
	Conte	ext sensitive	Print Documents
Freight Billed Freight \$0.00 Allocation Method Amount	Order Treight \$0.00	ontrols	<u>Comments</u>
14 4 6 61 Y			admin SOA 6/30/2008 🜌 🏑

Select Customer Shipm	ent				
🕨 📓 🖏 🔚 🖌	<b>8</b> 2				
Setting (None)	•				
Select					
Field	Condition			<b>_</b>	Select
Shipment	All				
Shipment Status	All				<u>D</u> e-Select
Ready To Commit	Is equal to	✓ Yes			
Ship Date	All				
Ship Whse	All				
Customer	All	New S	Shipment		
Customer Name	All				
Ship To Address	All	Selection	on Criteria	a	
1					
<u> </u>					
Shipment	Ship Date	Ship Whse	Customer	Customer Name	Ship To Ac
000000605-SH	03/15/2008	Vernon	AlGar	Alicia Garage Doors	Alicia Garage (
0000000713-SH	06/05/2008	Rialto	Aldebrn	Aldebaran, Inc.	Aldebaran, Inc
•					
				admin SOA	06/30/08 🗐 🏒

When selecting shipments to commit in batch, search criteria allows you to easily find shipments that are flagged as "Ready to Commit".



#### **Cascade Sales Order Line Updates**

In Sales Order Entry, updates made in the order header controls will optionally cascade down to all open sales order line items. Changes to the following details are supported:

- Ship To (FOB, Ship Via, Sales Tax)
- Ship Via (from line defaults)
- Delivery Method (FOB, Ship Via, Freight Amount, Preferred Vendor, Sales Tax)

In order to use this feature, the order lines must be in an open status and in the case of the delivery method controls, the order lines must be open with no activity.

### **Credit Card Entry**

Credit card payment information can be entered in the following Sales Order tasks:

- Enter Sales Order and Quotes
- Edit Shipments
- Process Sales Orders

# Accounts Payable Enhancements

#### Automated Clearing House (ACH)

The ACH feature allows you to use electronic funds transfer (EFT) as an alternative to checks as a payment method. The ACH feature supports both the United States (NACHA) and Canadian (AFT) formats.

#### **Positive Pay**

Positive Pay provides a useful tool in preventing check fraud by generating a file that is submitted to your financial institution to verify check information prior to payment. If check data matches the vendor's information, the bank will process the check.

#### **Vendor Merge**

You can now quickly and easily merge vendor information from one "source" vendor into another "target" vendor, and permanently remove the source vendor from your database. Merged data includes all aging and history records.

# Accounts Receivable Enhancements

#### **Customer Merge**

This feature enables you to merge customer information from one "source" customer into another "target" customer, and permanently remove the source customer from your database. Merged data includes all aging and history records.

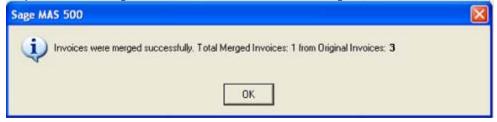


#### **Invoice Merge**

Multiple shipments can be merged into a single invoice. A new AR security event allows you to control which users have access to this function. The following conditions must be met:

- All line items must originate from same sales order
- Transactions must be "invoice" (not credit memos)
- Must all be same currency
- Invoice cannot have a down payment

Upon completion, message informs user of number of merged invoices created.



#### **Credit Card Refunds**

Refunds for credit card payments can conveniently be issued in the Process Cash Receipts and Process Invoices tasks.

#### System Manager Enhancements

#### **Enhanced System Status**

The System Status screen is a valuable tool for larger systems by providing enhanced system performance monitoring and allowing you to analyze Sage MAS 500 connections to help quickly identify and resolve any locking or blocking issues. A new Setting Options window allows you to:

- View and hide other SQL Server connections outside of Sage MAS 500
- Set automatic refresh interval
- Initiate on-demand refresh



Refresh Ctrl-Shift-R Uptions and Settings	Connections	
ptions Show only MAS 500 connections? Show only blocking and blocked connections?	Enhanced Display Options	
Efresh Settings	Automatic Refresh Settings	
An auto-refresh interval less than 30 seconds may degrade he performance of the monitored client/server.		

Additionally, extended session detail information includes:

- Blocked indicators (showing blocking session ID and wait time)
- Terminal services session information ("piggyback" connection and see what the user is seeing)
- Session Command and Application Context provide information on what the user was doing when the lock occurred

Zpa	ons and Setting	1		Connections				
Process ID /	Status	User	Blocked	Description	Company	Host Name	WTS Client	WTSI
51	sleeping	admin	0	Managed Session	SOA	JWGCB		
52	sleeping	admin	0	Object Manager		JW/GCB		
	sleeping	admin		Application		JWGCB		
	sleeping	admin		System Status Monitor	SOA	JWGCB		
	runnable	admin		System Status Monitor	SOA	JWGCB		
56	suspended	admin		Naintain Vendors	SOA	JWGCB		
57	eleeping	admin	9	Lookup View Global		JWGCB		
61	sleeping	JWGCB\Administrator	0	3		JWGC8		



#### **New Security Events**

With Sage MAS 500, you control which users have the authority to execute certain tasks and functions. New security events were added for the Sales Order, Inventory Management, Purchase Order, and Credit Card Processing modules.

Below is a list of new security events.

Module	New Security Event
Accounts Receivable	Merge Invoices
Credit Card	Bypass Address Verification
Credit Card	Bypass Security Code Verification
Credit Card	Modify read-only processor account additional parameters
Credit Card	View secured processor account additional parameters
Inventory Management	Delete frozen qty cards during Physical Count Entry
Inventory Management	Set Uncounted to Zero during Physical Count Entry
Accounts Payable	Allow multiple copies of a check
Purchase Order	Delete Purchase Order
Sales Order	Delete Sales Order
Sales Order	Delete Invoice
Sales Order	Generate Invoice
Sales Order	View Invoice Total

For example, if you open a data entry task in Sales Order or Purchase Order and attempt to delete an existing order, the system checks your security setup to verify that you have the appropriate permissions to delete the order. If you do not have the appropriate security setup, a message dialog box appears that allows you to override the security event.





# Source Code Additions in v7.3 SDK

Source code for the following PSG xAPIs is included in the 7.3 Software Development Kit (SDK):

- Import AR Pending Cash Receipts xAPI
- Import Inventory Transactions xAPI
- LockBox (import and post receipts from a bank file)

# **Performance and Scalability Enhancements\***

\* Performance results in this section are based on Sage internal testing. Individual performance may vary. Since many factors impact system performance, Sage does not guarantee that each customer will experience the same results.

### Scalability Improvements

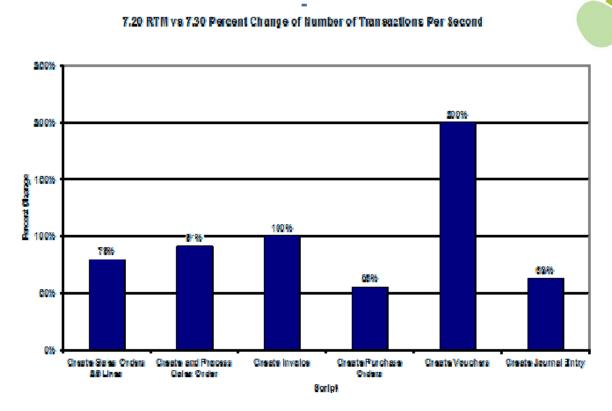
Scalability in version 7.3 has been improved to support up to 70% more concurrent users than version 7.2, while maintaining comparable response times.

#### System Wide Performance Improvements

System performance in version 7.3 has been improved significantly in numerous areas. Compared to the initial release of version 7.2:

- Create and Process Sales Order can process 90% more transactions per second
- Create Invoice task can process 100% more transactions per second
- Create Purchase Order task can process 50% more transactions per second
- Create Vouchers task can process 200% more transactions per second
- Create Journal Entry can process 60% more transactions per second
- Cash Receipts Entry load & process is up to 99% faster on large loads
- Save Edited Shipment is approximately 50% faster
- Enter Sales Order and Print Invoice is approximately 75% faster
- Sales Order Shipment Commit is approximately 70% faster
- Sales Order Shipment Validation is approximately 50% faster
- Manufacturing Work Order Posting is up to 95% faster on large postings





Additional details on Sales Order Commit and Sales Order Validation are shown below using different tracking methods.

## Sales Order Commit

Tracking Method	Performance Improvements
Average	54% faster
Standard	70% faster
Lot	73% faster
Actual	70% faster

## Sales Order Validation

Tracking Method	Performance Improvements
Average	54% faster
Standard	58% faster
Lot	58% faster
Actual	44% faster

# **Crystal Reports Performance**

The Report Update Utility has been created to improve the performance of Crystal Reports by eliminating redundant validations caused by metadata inconsistencies.



# Manufacturing Production Entry and Labor Entry

Performance has been significantly improved in the manufacturing Production Entry and Labor Entry tasks. By eliminating concurrency issues, performance on these tasks has improved approximately 90%.

Operational Area	Performance Improvements	
Work Order Posting	95% faster on large posting	
Labor Transaction Posting	89% faster on large posting	

# Sage Software Solutions

# Sage SalesLogix ERP Link 3.0

Sage SalesLogix ERP Link 3.0 for Sage MAS 500 will continue to be supported in version 7.3. This link changes the way you do business by providing access to the most current product information, pricing, discounts, and inventory status when creating quotes or taking orders in Sage SalesLogix. In addition, without having to leave Sage SalesLogix, you can view all relevant Sage MAS 500 customer data such as credit status, terms, and account balance so your sales personnel can deliver first class customer service.

Version compatibility:

	Sage SalesLogix Version	
Sage MAS 500 Version	7.22	7.5
Sage MAS 500 v7.3	Yes	Yes
Sage MAS 500 v7.2 (Dec 2008 MU or later)	Yes	Yes

# Sage Abra HRMS v8.5

For over 25 years Sage Abra has been a leader in affordable and trusted HR and Payroll software solutions. A major enhancement in version 8.5 is the ability for employees to view and access payroll data and pay history in Abra Workforce Connections (AWC) Employee Self Service. For additional details, please contact your authorized Sage Abra Business Partner.

# Sage FAS 500 v2009.1.1

The award winning Sage FAS 500 fixed asset management solution for 2009 includes the Assets Snapshot dashboard, updated tax law compliance, support for Crystal Reports 11, and changes from the American Recovery and Reinvestment Act of 2009. For details, see

http://www.sagefas.com/imageserver/portal\_managed\_assets/sagefas/PDFs/FAS200911\_W hats\_New.pdf.



# Sage TimeSheet v9.8

Sage TimeSheet v9.8 for remote Time and Expense entry and project management provides an integrated MAS 500 solution for professional service organizations that need to track and bill projects based on a fixed or time and material basis.

New features delivered in version 9.8 include:

- Simplified time entry including:
  - Easy identification of the task the user is about to enter in TimeSheet view
  - o Ability to resize each component in the task window individually
  - Ability to add time (such as holidays) to all employees at once
  - New configuration option in the TimeCard view so modifications of the start time will not impact the end time
  - Improved data validation of fields
- Time Saving Features
  - Mark as complete feature enabled in core product allowing everyone to quickly close completed tasks
  - New print button for reports
- Support for Microsoft Windows Server 2008 & SQL Server 2008

# **Third Party Considerations**

# Crystal Reports v10.0

Crystal Reports provides access to your data and allows you to format it, and deliver it as information inside and outside your organization. There will be no changes to Crystal Reports with this release.

# Microsoft FRx v6.7 SP 10

FRx is a financial reporting application that gives midsize organizations and corporate businesses control of their entire financial reporting process across one or more legal entities. There will be no changes to FRx with this release.

NOTE: Microsoft will allow distribution of FRx and related extensions through **December 2011**, and will continue to support FRx through **December 2012**.

# StarShip Parcel 9.9.7

StarShip Parcel integrates tightly with Sage MAS 500 and makes the entire shipment management process more fluid. Plus, when combined with the pick, pack, and ship feature built into the Sales Order module, StarShip Parcel helps your company become a more competitive distributor and even offers features that can potentially reduce your shipping and shipping-related expenses.

# StarShip Freight 10.0.3

StarShip Freight makes shipping items on pallets in a truckload (TL) and less-thantruckload (LTL) more efficient and cost effective.



# **Technology Features**

## Data Migration

Data Migrator version 7.3 will support migrations from Sage MAS 90 and 200 v4.1.

## Platform Support Overview

The following are general platform support guidelines for this release. Complete details will be published in late October in the Sage MAS 500 v7.3 Compatibility and Resource Guide.

**Microsoft SQL Server 2008 and 2005:** Full SQL Server 2008 and 2005 support for Sage MAS 500 databases. For complete details about the updates and changes available in SQL Server 2008 please visit http://www.microsoft.com/sqlserver/2008/en/us/whats-new.aspx.

Accounting Server OS: Microsoft Windows Server 2008 and Windows 2003 Server.

**Microsoft Visual Studio 2008:** Sage MAS 500 utilizes the new .NET Framework 3.5 development toolset. Application benefits include increased performance and throughput in the Desktop, Business Insights Explorer, and Business Insights Analyzer areas.

#### Virtualization / Thin Client:

**Microsoft:** Windows 2008 Hyper-V, Windows 2008 Terminal Server, Windows 2008 RemoteApp, Windows 2003 Terminal Server

Citrix: XenServer 5.0, XenApp 4.5

VMWare: VMWare Server ESXi 3.5, VMWare Workstation 6.0

Accounting Client OS: Windows Vista SP1, and Windows XP SP3.

**Web Server OS:** Microsoft Windows Server 2008 IIS 7.0, and Windows 2003 Server and IIS 6.0.

Browser: Microsoft Internet Explorer 7.0 and 6.0.

Microsoft Office: Office XP, Office 2003 and Office 2007.

#### **Platform Retirements**

The following platforms will not be supported in v7.3:

- SQL Server 2000
- Windows 2000 server and client



# **Recommended System Requirements**

Sage MAS 500 Edition	Server	Client
Small Business Edition	Single Pentium Xeon or better 1 GB RAM 2 GB disk space	
Standard Edition	Dual Pentium Xeon or better 2-4 GB RAM 4 GB disk space	Pentium IV or better 1 GB RAM
Enterprise Edition	Dual Pentium Xeon or better (Quad capable) 4-8 GB RAM 10 GB disk space	

# **Version Retirements**

Versions 6.3 and 7.0 were previously scheduled to be retired by the end of 2009, but due to economic conditions and customer feedback, Sage will extend support for these versions to allow customers additional time to plan and budget for the upgrade to a current version of Sage MAS 500.

Support for versions 6.3 and 7.0 will be retired during 2010. The retirement date is being finalized, and will be announced shortly.

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